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Sector reports review: September 2018 to January 2019

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Abstract

This paper provides a summary of selected reports and papers ('grey literature') published by key HE sector organisations in England (and the UK), and 'think tanks' between September 2018 and January 2019. These include: Advance HE; the All-Party Parliamentary Group for Assistive Technology (APPGAT); Association of Graduate Careers Advisory Services (AGCAS); Department for Education (DfE); GuildHE; High Fliers; Higher Education Policy Institute (HEPI); Higher Education Statistics Agency (HESA); House of Commons Library; Institute for Fiscal Studies (IFS); Jisc; Migration Advisory Committee (MAC); Office for Fair Access (OFFA); Office for Students (OfS); Papyrus UK (Prevention of Young Suicide); Policy Connect; The Sutton Trust; The Universities and Colleges Admissions Service (UCAS); UK Advising and Tutoring (UKAT); Universities and Colleges Information Systems Association (UCISA); UK Council for International Student Affairs (UKCISA); UK Standing Committee for Quality Assessment (UKSCQA); Universities and Colleges Union (UCU); Universities UK (UUK); Universities UK International (UUKi); Warwick Economics and Development (WECD); The 1752 Group.

The themes covered in the paper include: grade inflation; post-qualification applications; unconditional offers; access and participation plans; the multiple equality measure; outreach; targeted tuition fees; degree apprenticeships; the English Baccalaureate; the student voice; analysing qualitative data; student engagement; students' unions; student engagement and experience surveys; part-time learners; commuter students; flexible learning; student wellbeing (suicide prevention, personal tutoring); equality and diversity; religion and belief; sexual misconduct; technology enhanced-learning (TEL); TEL accessibility; the intelligent campus; managing change; the graduate labour market; employability; first destinations of disabled students; enterprise education; graduate earnings; internships; practice-informed learning; graduate wellbeing; institutional accountability; internationalisation; student outward mobility; transnational education; and the HE workforce (academic staff).



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Student data

Citing several HESA sources, UUK (September 2018a; December 2018) released a statistical overview of the sector.

- Reflecting a fall in the 18-year-old population in the UK, and falling demand from 19-year-olds and the mature (25 and over) age groups, by January 2018, the deadline for which most prospective students submit undergraduate (UG) applications, there was a 0.9 per cent reduction compared to 2017. 18-year-olds, however, were more likely than ever to apply to higher education (one per cent more likely compared with 2017). Applications for 18-year-olds living in areas in England with low participation in higher education increased to the highest levels recorded (22.6 per cent).
- EU UG applicants increased by 3.4 per cent from the previous year, and the number of international (non-EU) applicants increased to its highest ever number, 58,450 (up 11 per cent). 14 per cent of UG students and 35 per cent of PG students were from outside the UK.
- Between 2007/08 and 2016/17, first degree students increased by 22.3 per cent, postgraduate research (PGR) by 20.3 per cent, and postgraduate taught (PGT) students by 7.7 per cent. Following the introduction of student loans for masters courses in 2016/17, there was an increase in PGT study of 4.6 per cent compared to 2015/16. However, overall, part-time registrations were 37.2 per cent lower than in 2007/08.
- Non-continuation rates of UK domiciled full-time, first degree entrants after their first year had improved from 2006/07 to 2015/16. In 2015/16 the non-continuation rate for young students was 6.4 per cent, but 11.6 per cent for mature students.

- Between 2007/08 and 2016/17, veterinary science, biological sciences and mathematical sciences witnessed the most significant increases (47, 40, and 29 per cent respectively). Conversely, combined subjects, education, and languages had the largest decrease in students (67, 26 and 21 per cent respectively).
- Subjects with the lowest proportions of black and minority ethnic (BME) students included veterinary science (4.9 per cent), and agriculture and related subjects (5.8 per cent), while the biggest proportions of BME students were in medicine and dentistry (35.5 per cent), law (34.1 per cent) and business and administration studies (32.7 per cent).
- Gender profiles varied greatly for some subjects, notably computer science (17.2 per cent female: 82.8 per cent male), and engineering and technology (17.6 per cent female: 82.4 per cent male). Subjects with the highest overall proportions of females were: subjects allied to medicine (79.1 per cent); veterinary science (77.3 per cent); and education (76.6 per cent).

Grade inflation

In response to a publication from the UKSCQA (November 2018), which revealed a growing proportion of firsts and upper second class degrees (or ‘grade inflation’), the OfS (December 2018b) published analysis of changes in the proportion of these degrees between 2010/11 and 2016/17. The OfS found that, across the sector as a whole, 11.6 percentage points of the increase in first and upper second-class degrees awarded were “unexplained” by changes in the graduate population. (For example, graduates entering HE with the equivalent grades CCD or below at A-level were almost three times more likely to graduate with a first

class honours in 2016/17 than in 2010/11.) In respect of first class degree attainment for 148 providers in 2016/17, the OfS revealed:

- 52 per cent of providers (n=77) showed a statistically significant unexplained increase relative to both the sector and their own level in 2010/11;
- A further 19 per cent of providers (n=28) showed a statistically significant unexplained level of attainment above that of the sector in 2010/11, but no significant change relative to their own level in 2010/11; and
- Another 13 per cent of providers (n=9) showed a statistically significant unexplained increase relative to their own level in 2010/11, but attainment not significantly above the sector level in 2010/11.

The OfS warned, “where providers do not take sufficient action to address [grade inflation], we may use the full range of our regulatory powers to intervene” (p. 4). The UKSCQA (November 2018) recommended all HE providers to make “a statement of intent to protect the value of qualifications over time” by (p. 4):

- Publishing analysis of institutional degree outcomes, supported by appropriate external assurance, in a ‘degree outcomes statement’ or equivalent;
- Publishing and explaining the design of the degree classification algorithm, including where it deviates from accepted norms of practice;
- Ensuring that assessment criteria meet and exceed sector reference points and reviewing the use of data in quality assurance processes;
- Supporting the professional development of academics working as external examiners to help maintain standards and the value of qualifications; and

- Reviewing the structure of the degree classification system to ensure that it remains useful for students and employers.

Post-qualification applications

In a report for UCU, following stakeholder consultation, Atherton and Nartey (January 2019) advocated “a more systematic approach to higher education admissions” in England, Northern Ireland and Wales, and proposed a change to the admissions system following criticisms over the sharp rise in unconditional offers. The report authors endorsed post-qualification application (PQA), i.e. once students knew their exam results and, to accommodate this change, proposed that first year courses start in November.

Unconditional offers

In the first issue of their *Insights* series, the OfS (January 2019a) outlined its position on the rapid rise of unconditional offers, raising particular concerns to those offers that require students to commit to a particular course. The OfS indicated that it would take action “where [the offers] are not in students’ interests” (p. 2). The OfS recognised that some providers were seeking to justify unconditional offers as a tool to support fair access for disadvantaged students though, at the same time asserted that contextual offer making was a more effective way of achieving fair access. The OfS indicated that it would make clear where ‘pressure selling’ practices were risking a breach of consumer protection law and resolved to “empower students to challenge this... taking regulatory action if appropriate” (p. 2).

A supplementary guide to the *Insight* briefing was also released (OfS, January 2019b). Referencing UCAS (December 2018) data,

the guide underlined that in 2018 over 1,000 18-year-olds missed they predicted A-level grades by two or more grades through holding an unconditional firm offer.

Applicants from areas with lower participation in HE were more likely to receive an unconditional offer, and the non-continuation of students placed through UCAS in 2014 and 2015 were slightly higher through unconditional offers (6.6 per cent) than those placed through conditional offers (5.3 per cent).

In analysis by subject area, UCAS (December 2018) noted that unconditional offers were most likely to be made for creative arts and design courses: in 2018, 18 per cent of all offers made to study these courses were recorded as unconditional. However, it was stressed, “Offers to these courses are commonly based on an applicant’s portfolio, or performance in an audition, meaning that offers only become unconditional once the applicant has displayed a level of talent or potential though media other than in the initial application to university” (p. 19). Conversely, only a small proportion (between 0.2 and 0.3 per cent) of offers to study courses in medicine and dentistry were recorded as unconditional.

Access and participation plans

The OfS (December 2018a) published outcomes from a consultation on a new approach to regulating access and participation in English HE. The OfS advised that the sector needed to make “significant progress” to 2024/25 – a period in which the next round of access and participation plans (APPs) will operate. Amongst the findings, there was:

- Broad support for the proposal that APPs should normally remain in place for a period of at least three years and up

to five years, rather than annually, thus enabling HEPs to think and plan more strategically, develop innovation and embed sustained interventions in partner schools and colleges;

- Broad support for the proposal that providers be required to publish to the OfS an impact report each year, though there was concern about how the OfS would ensure clarity and rigour in how it identified and monitored risk;
- Broad support for the proposal that providers be expected to include strategic, challenging and outcomes-focused targets for access and participation, with measurement of the comparability of performance across the sector;
- A higher-than-average proportion of respondents from medium and low tariff HE providers, NUS and student unions raised concerns of published data being inappropriately contextualised, “being misunderstood and potentially misused, resulting in an unofficial league table” (p. 23);
- Respondents broadly agreed that a strong focus on targets and outcomes would create enough pressure to secure sufficient funding for access and participation to achieve change; and
- Agreement that an evaluation self-assessment tool would lead to improvements in evaluation practice though a sizeable proportion (20 per cent) disagreed.

Multiple equality measure

UCAS (2018a; 2018b) outlined the formulation underlying the multiple equality measure (MEM), an equality metric for HE that combines the effects of measures already applied into a single value. The MEM takes the form of ‘one’ to ‘five’ group value. An individual who is in MEM ‘group one’ is among the most disadvantaged in

terms of their likelihood to enter HE, based on their set of background characteristics: an individual in MEM 'group five' is among the most advantaged.

UCAS argued that there were four benefits of the methodology: greater accuracy, flexibility (i.e. adding additional equality variables), data-driven analysis, and a higher degree of individual specificity. To demonstrate this, in analysis of entry rates by MEM group, they showed that the rate of MEM group one students in 2017 was 12.2 per cent, compared to 56.2 per cent for MEM group five. The MEM entry rate gap was 4.7 (i.e. on the MEM measure, the most advantaged students were 4.7 times more likely to enter HE than the most disadvantaged students). UCAS argued that this represented a wider gap than shown by analysis of POLAR3 quintile alone, where the most advantaged students on the measure (POLAR3 quintile 5) were 2.3 times more likely to enter HE than the most disadvantages (POLAR3 quintile 1).

Outreach

In a report for the OfS and OFFA, Harrison et al. (December 2018) examined pre-16 outreach activities delivered in the 2016/17 academic year and analysis of activities planned in the 2017/18 access agreements. Amongst the findings, the project confirmed that nearly all HE providers were engaging with pre-16 outreach activity with proportionately more activity in pre-1992 HE providers, those with higher average entry tariffs and higher overall spend on access. The report highlighted considerable variability in the quality and robustness of the evaluation activity (e.g. over-reliance on descriptive statistics and low use of inferential and/or multivariate analysis, where appropriate).

In a report for The Sutton Trust, Montacute (December 2018) examined the influence of schools on admissions to the top universities. The study determined that eight top schools had as many Oxbridge acceptances as another 2,894 schools and colleges put together. Independent school pupils were seven times more likely to gain a place at Oxford or Cambridge compared to those in non-selective state schools. In Mansfield's (January 2019) 'occasional paper' for HEPI on the impact of selective secondary education on progression to HE, it was concluded that, "the advantage [of selective secondary education] is only marginal on progression to HE as a whole, but the differential is much bigger for progression to highly-selective higher education or, even more, to Oxbridge..." (p. 47).

In a briefing paper for the House of Commons Library, Bolton (January 2019) provided a summary, with both contemporary and historical data, on 'Oxbridge elitism'. Women accounted for 56.4 per cent of all UG courses in the UK, but only 49.4 per cent at Oxford and 47.5 per cent at Cambridge. In 1992, five per cent of all applicants to Oxford were non-white, rising to 18 per cent in 2017. At Cambridge, in 1990 approximately five per cent of applicants were non-white rising to 22 per cent in 2017. The paper noted that both Oxford and Cambridge had significantly fewer pupils from the state sector than their benchmark values but also noted that the institutions "were not alone in scoring below the benchmark values for state school and lower socio-economic group participation" (p. 9).

Targeted tuition fees

Usher and Burroughs (October 2018) examined targeted tuition fees (TFT) in a report for HEPI. Noting that TFTs "had

not resurfaced in a serious way in the UK since 2006”, and drawing on international comparisons, the authors posited that under TFT, poorer students would pay less, but students from wealthier backgrounds would pay more than others.

Degree apprenticeships

The HEC (January 2019), an independent body made up of leaders from the education sector, the business community, and the three major political parties, published findings that cast doubt on the impact of degree apprenticeships for small and medium enterprises or disadvantaged students. Whilst employers welcomed degree apprenticeships in principle, some were concerned that the standards were inflexible and could become out-of-date in relation to future skills needs. The Commission also highlighted a dearth of providers, and that degree apprenticeship cold spots were emerging in existing areas of educational and economic disadvantage.

English Baccalaureate

First introduced in 2010, the English Baccalaureate (EBacc) is a performance measure based on attainment in core academic subjects. The DfE (January 2019) investigated how pupil entry and attainment rates in EBacc subjects differ based on the HE institutions a pupil goes on to attend. The analysis focused on language and humanities entry, historically the most common missing pillars for pupils entering four of the five EBacc pillars (the five pillars are: English, mathematics, history or geography, the sciences, and a language). A cohort of pupils at the end of Key Stage 4 (KS4) in 2012 and their subsequent progress into HE institutions was traced across a three-year period.

- 92 per cent of 2013 KS4 pupils who entered a UG course at an Oxbridge college entered the EBacc language pillar, and 88 per cent entered the humanity pillar. 78 per cent of these pupils entered the full EBacc combination of subjects.
- 82 per cent of 2012 KS4 pupils who entered a UG course at a Russell Group university entered the EBacc language pillar, and 82 per cent the humanity pillar. 66 per cent of these pupils entered the full EBacc combination of subjects.
- Pupils attending other HE institutions were almost half as likely to have entered the EBacc (36 per cent) compared to those attending Russell Group universities. These pupils were also less likely to have entered the EBacc language pillar (57 per cent) and the humanity pillar (64 per cent) at KS4 in 2012.

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The student voice

In a ‘small development project’ for Advance HE, Jones-Devitt and LeBihan (October 2018) examined the experience of academic staff as the subjects of student evaluations, and the challenges presented for academic leaders. Amongst the key findings, the report highlighted (p. 13):

- A need for discussion concerning the practice of using formal student evaluations for leadership and management purposes;
- That snapshots of quantitative analyses were often used to drive widespread significant change, with little further triangulation and regardless of whether they were sufficiently robust and meaningful;
- A need to offer students more effective advice and guidance concerning the constituents of effective feedback;
- A need to recognise the dynamic nature of student voice feedback; and

- A recognition of the construction of peer-supported reflective engagement process for staff, generated by module/course evaluations, as a key facet of the management of the student voice.

Analysing qualitative data

Advance HE issued guidance for university and college practitioners on analysing qualitative data, specifically on small to medium-scale research projects in areas of equality, diversity and inclusion, teaching and learning, and governance, leadership and management (Guyan, December 2018). The report author acknowledged that encouraging senior leaders to look beyond headline statistics presented a key challenge to many practitioners (p. 5).

Student engagement

Neves (November 2018) reported on the findings of the UK Engagement Survey (UKES), which was administered in 38 institutions, and comprised 34,635 UG respondents: in 2017, there were 42 participating institutions and nearly 36,000 respondents. The report noted that overall engagement levels continued to increase (this was the fourth consecutive year that UKES had been running), with “partnering and interacting with staff” showing the highest improvement.

In terms of skills, UGs in the sample reported lower levels of developing ‘softer’ skills, such as becoming ‘active citizens’, developing real-world values and understanding others, compared to ‘academic’ skills such as critical thinking and independent learning. The level of career skills development was also relatively low though only first and second year UGs complete UKES.

The data on time spent studying highlighted a clear and consistent decline in hours spent

in both taught and independent study. This was matched by a continued drop in participation in sports and societies. By contrast, time spent working for pay continued to increase, as did volunteering and caring: as evidenced in the data, time spent on these activities could impact directly on the time available for study.

The 2018 report analysed the experiences of commuter students in detail for the first time. The data highlighted how commuter students, in spite of the time spent travelling, were more likely to spend longer hours in both taught and independent study, and take part in extra-curricular activities. Linked to this, levels of engagement and skills development was also higher among commuter students, thus underlining the high levels of commitment of these students. The report also noted a similar pattern among students from low participation neighbourhoods, evidence of “high levels of motivation and organisation in order to make the most of their time at university” (p. 4).

Students’ unions

In Day and Dickinson’s (September 2018) report for HEPI on students’ unions in the UK, they advised that a “repurposing” was required in order for these bodies to remain relevant to the student body and sector of today. For instance, in recognising the importance of unions in supporting and co-ordinating activities outside the classroom, the authors cited a concern that “sports clubs and societies may mask social sorting by class, background or nationality” (p. 66). The report authors cited opportunities for unions to be more heavily involved in supporting the internationalisation agendas, supporting wellbeing and careers, and nurturing debate and discussion. Three recommendations, with respect to HE providers, were articulated:

- Providers should ensure that their students have access to professional, well-funded independent advocacy in the event of a complaint or appeal;
- HE governing bodies should refine their practice in involving students, when considering their own accountability; and
- The induction of student leaders into the culture, practice and workings of universities, “could usefully be turned on its head” (p. 80).

Taught postgraduates

Leman (November 2018) reported on the findings of the 2018 Postgraduate Taught Experience Survey (PTES). Nearly 86,000 PGTs from 106 institutions responded to the survey, thus representing a response rate of 29 per cent.

Nine out of ten PGTs reported satisfaction with their courses, largely driven by very positive perceptions of teaching delivery. However, 22 per cent considered leaving their course when study did not go as the student expected. The PTES 2018 report focused, in particular, on age, domicile, and ethnicity. Older students reported higher satisfaction, whilst students of Asian and mixed ethnicity, and students identifying as gypsy or traveller, reported much higher levels of negative perceptions than other ethnic groups. Among the headlines, the report noted the following:

- Downward trends in course organisation and career preparation;
- Strong upward trends in feedback, resources and aspects of engagement;
- A significantly positive student experience reported among those who had higher motivation elicited from their subject choice;
- African and Asian students had relatively positive perceptions of organisation and their experience overall, whilst North American and EU students had relatively

negative perceptions of assessment and their experience overall.

Postgraduate research students

Neves (October 2018) reported on the findings of the 2018 Postgraduate Research Experience Survey (PRES). Whilst PGRs rated their experience positively, with eight out of ten being satisfied, a two per cent decline since 2017 was noted across most mission groups. “Relatively disappointing” figures were returned from Small and Specialist, Million Plus, GuildHE and institutions in London (London witnessed the sharpest decline). By contrast, institutions in Wales, and those within the Cathedral Groups recorded very positive experiences.

The most positive experiences revolved around the quality of supervision, with around nine out of ten researchers satisfied with their supervisors’ knowledge and availability. In comparison, results were less positive when it came to research culture, with only around 60 per cent satisfied with “their research ambiance, and their opportunities to collaborate with other students” (p. 3).

UK domiciled researchers of black ethnicity were most likely to believe their research degree programme was worthwhile, though disabled learners were less satisfied overall. Those researchers in their fourth year and beyond reported the most negative experience. In contrast to UG students, as reported in Advance HE’s Student Academic Experience Survey, PGR wellbeing remained broadly consistent in 2018 – although, for a large number of researchers, work-life balance in particular remained a concern.

Just under half of researchers had taught or demonstrated during their research degree, and this represented a significant drop of six

per cent since 2017. In terms of career plans, there was a sharp increase in the proportion of PGRs wishing to pursue an academic career, as opposed to taking up a professional (non-research or non-teaching) role.

Part-time learners

UUK's (October 2018b) *Lost Learners* report explored the socio-economic profile of prospective students who considered, but did not pursue, part-time HE since 2010. These 'lost learners' were identified through an online survey conducted across the UK, with a sample of 835 adults. The research explored their reasons and motivations for considering part-time study, the reasons and motivations for considering part-time study, the reasons why they did not end up completing a higher education course, and the impact this had on their lives.

Lost learners were most interested in the subjects of health, public services and care, and business, finance and law, at UG level. Just five per cent of these learners were prompted into study by their employer: motivations to attend were based on learners' own intentions.

The cost of tuition fees was the most frequently cited reason for not taking up part-time study. The lack of flexibility around life commitments and work during study was also a significant reason for not starting part-time higher education, and it was the most common reason for dropping out of study. In terms of the emotional impact, half of lost learners were 'somewhat disappointed' that they did not take up part-time study, 76 per cent had not improved their job position, and 67 per cent did not increase their household income.

Commuter students

In a report for HEPI, and sponsored by Universities Partnerships Programme (UPP), Maguire and Morris (December 2018) presented an outline of the commuter student (itself "an ill-defined term"), together with practical recommendations (pp. 7-8):

- Adapting welcome and induction activities;
- Providing better advice and guidance about commuting;
- Matching the curriculum and assessment models to commuter students' needs;
- Organising the timetable into blocks to concentrate campus presence;
- Creating online commuter support communities with activities close to commuter students' homes;
- Providing useful facilities for commuters such as lockers, common rooms and kitchens;
- Minimising the impact of commuting through ride-share and cycling schemes, car parking provision (where appropriate) and attention to travel safety issues; and
- Providing co- and extra-curricular activities during the day or early evening to maximise accessibility.

Flexible learning

UUK (October 2018a) detailed the extent of flexible learning across HE from three perspectives: pace of study (from part-time to accelerated courses); flexible learning across HE institutions, FE colleges and alternative providers (AP); and different ways of delivering learning (including classroom-based, online and employer-based training).

- There were 612,200 part-time students across all types of provider in the UK in 2016/17 – a decline of 11 per cent since 2013/14. A majority of part-timers (61 per cent) were female; 81 per cent were

living at home; 41 per cent of PG students were part-timers (25 per cent of UGs); and 31 per cent of students aged 40 and over were on part-time modes of study.

- In 2016/17, whilst HE institutions accounted for 85 per cent of all part-time study, as a proportion, this mode of study was greater at FE colleges but considerably lower at APs. At HE institutions, it was found that part-time provision was spread across PG (44 per cent), 'other UG' [e.g. foundation, diplomas in HE, Higher National Diploma, Higher National Certificates] (23 per cent), and first degree courses (32 per cent), whereas in FE colleges, 94 per cent of part-time provision was related to other UG courses.
- An estimated 2,500 to 3,400 students enrolled on accelerated degree courses in England, accounting for 0.2 per cent of all UG provision. In England, six APs provided 70 per cent of accelerated degrees, with the remaining proportion spread across 24 HE institutions. Business, law, and languages accounted for 60 per cent of provision in England.
- Whilst classroom-based part-time study was the most common form of flexible learning, a shift towards employer-based and online learning was perceptible at some institutions. In 2016/17, online learning made up eight per cent of all provision at UK HE institutions, with The Open University accounting for 65 per cent of all online learning; the number of HE institutions offering online provision increased from 102 in 2010/11 to 117 in 2016/17.

UUK identified the following drivers of flexible learning: learner expectations and increasing pressures on learner time and availability; increasing employer interest in "bundling short courses across disciplines

and institutions" rather than just full HE programmes; technological change; increased competition for students; and new regulation.

Between December 2017 and February 2018, the Government consulted on specific proposals to incentivise wider provision and uptake on accelerated degree courses in England. The key proposal including increasing the annual tuition fee cap chargeable by HE providers for accelerated degrees, by 20 per cent of the standard fee cap per annum. Respondents expressed a range of views on the detail of the Government's proposals (DfE, November 2018). There was a broad correlation between agreement with the proposed changes (from existing accelerated degree providers), and disagreement about whether a 20 per cent increase in annual fees for accelerated degree courses would incentivise more providers to enter the market, from those not offering accelerated courses.

There was also a divergence of views on the principle and impacts of accelerated degrees, particularly from providers not offering accelerated degrees. These focused on the familiar benefits of continuing to provide degree courses along established lines, rather than the potential benefits of greater choice and more flexible provision.

Suicide-safer strategies

UUK and suicide prevention charity Papyrus, published guidance embedding a 'suicide-safer strategy' at university. The guidance outlined: the factors that increase mental distress; an understanding of the risks; and identified the student groups at 'higher risk'. Further, the document listed prevention, intervention and 'postvention' ideas and actions (UUK and Papyrus, September 2018).

Personal tutoring

UKAT (January 2019) released the *Professional Framework for Advising and [Personal] Tutoring*. The framework articulated the following components:

- *Conceptual* – the ideas and theories that academic tutors must understand;
- *Informational* – the knowledge that advisors must possess to guide a student;
- *Relational* – the skills tutors need to use concepts and convey information from the Conceptual and Informational components to their students; and
- *Professional* – the commitment that advisors and tutors make to the students they advise, their institutions, their professional practice, and the broader educational community.

Equality and diversity

Advance HE (September 2018a) produced a detailed statistical analysis on age, disability, ethnicity and gender of students in HE for the 2016/17 academic year, as well as on the interplay of these identities. The following represents a very brief snapshot of some headline data.

- *Age* - The proportion of students classified as mature (i.e. aged over 21 upon entry) had fallen since 2003/04 and particularly since 2010/11, with 2016/17 marking its lowest level to date. Mature first degree UGs had higher rates of leaving HE without qualifying, receiving a degree class lower than a 2:1, and lower rates of progressing to further study than those aged 21 and under.
- *Disability* – Disclosure rates had steadily increased, rising from 5.4 per cent in 2003/04 to 12 per cent in 2016/17, with markedly higher rates recorded among UG students. There had been a noticeable rise in disabled students disclosing a mental health condition since 2015/16. Proportionately more disabled

students who qualified in 2016/17 were unemployed than their non-disabled peers. Similarly, lower rates of disabled first degree UG qualifiers received a first/2:1 compared with non-disabled qualifiers: a larger proportion of disabled qualifiers from non-SET (Science Engineering Technology) subjects achieved a first/2:1 than from SET subjects.

- *Ethnicity* – UK domiciled BME students were better represented among first degree UGs and PGTs than other UGs and PGRs, and within SET than non-SET subjects. There were pronounced differences in continuation and degree attainment outcomes for white and BME students, with lower rates of BME students continuing or qualifying and receiving a first/2:1 compared with their white peers. However, outcomes varied considerably by ethnic group, with particularly wide gaps observed between white and black students in relation to continuation and degree attainment.
- *Gender* – Women continued to make up the majority of students studying in the UK. Men were better represented among EU/non-EU students than UK domiciled students; among full-time students than part-time students; and among those studying SET subjects than non-SET subjects. There were gender imbalances at the subject level, with men comprising a large majority of students studying computer science, and engineering and technology, but only a small proportion of those in education, subjects allied to medicine, and veterinary science.

In a UCU-funded study, Bhopal and Pitkin (September 2018) explored the impact of the Race Equality Charter Mark (REC) in HE institutions. The study aimed to identify aspects of good practice on race

equality in institutions awarded the REC, and to explore views of member and non-member institutions towards the REC and race equality. The study involved 45 in-depth interviews with individuals from a range of roles working in HE. The following findings were reported in the study (pp. 4-5):

- All institutions (regardless of whether they were award holders, members or non-members) reported access to resources (e.g. funding for staff time) as being a key factor that affected whether they would participate in the REC application process;
- Award holders specifically singled out the significance of support from senior management in the application and submission process;
- Award holder institutions and member institutions consistently discussed a view that the process of applying for the REC was as important as achieving the mark itself;
- All of the institutions in the study had either conducted research on the BME attainment gap or expressed a desire to do so;
- All participants mentioned using the REC as part of a long term process to address the lack of representation of BME staff at all levels, but particularly at senior levels (both academic and professional staff);
- Participants highlighted the importance of the REC and its principles being linked to real institutional change; and
- Participants emphasised that the REC enabled all staff to address and confront the culture which encouraged a 'fear of race' existing in HEIs.

Harris and Woods (October 2018), in a small development project for Advance HE, analysed the impact of the Athena SWAN

Charter on arts and humanities departments. Athena SWAN was established in 2005 "to encourage and recognise commitment to advancing the careers of women in science, technology, engineering, mathematics and medicine (STEMM) employment on HE and research". The study focused on the perceptions and experiences of those involved in applying for an Athena SWAN bronze award, and the contributions this process had made to advancing gender equality. 27 full responses to a survey were analysed, and two focus groups were carried out involving, in total, 13 self-selected survey participants. Amongst the findings, the authors noted the following (p. 3):

- Participants were particularly sensitive to the possibility that institutions might use Athena SWAN awards to win external recognition in the absence of any serious commitment to gender equality; and
- As a lever for change, Athena SWAN had limited capacity to address inequalities arising from intersectionality, the gender pay gap, staff workloads, or certain institutional cultures.

In a small development project for Advance HE, Austen and Jones-Devitt (October 2018) tested the application of digital storytelling as an intervention for engaging in difficult conversations about positive cultural and behavioural change around 'critical Whiteness' within organisational development at Sheffield Hallam University. The method was found to be "both an incentive for participation and a broker for reflection and discussion" though, as concluded, "there must be a consideration of levels of comfort and neutralisation within the intended audience" (p. 7).

Aldercotte's (December 2018) 'Research Insight' paper focused on whether Advance HE's 'Achieving Race Equality in Higher Education' programme (held between April

2017 and June 2018) improved participants' familiarity with terms related to race equality and confidence in engaging with race equality. Specifically, participants were more familiar with terms such as: critical race theory; deficit approach; institutional racism; intersectionality; micro-aggression; race; and white privilege. Whilst there were acknowledged limitations in the research, Aldercotte suggested that the improvements exhibited by the participants would enable them to be better prepared to engage in race equality within their institution.

Religion and belief

Advance HE (September 2018c) issued guidance and recommendations on how to support the inclusion of staff and students of different faiths and beliefs, including those with no religious beliefs. Covering a wide range of themes, the guidance focuses on:

- student access, experience and learning (outreach, widening participation and recruitment; student funding information; admission and selection; enrolment and transition to study; inclusive learning and teaching; timetabling and attendance; examinations and assessment; and student support);
- staff inclusion (recruitment of staff; opting out of specific duties owing to religious belief; and staff faith/interfaith networks); and
- inclusive environments and facilities (catering; alcohol; accommodation; religious dress and symbols; prayer and worship).

Sexual misconduct

Bull and Rye (September 2018) reported on institutional responses to sexual misconduct carried out by academic staff in HE. Data

were gleaned from interviews with 16 female students and early career academics across 14 UK HE institutions, and analysis of 61 policies relating to staff sexual misconduct from a sample of 25 UK institutions. The report identified several sexual misconduct behaviours (boundary blurring and grooming behaviours, sexualised communication, sexual assault, stalking and surveillance, and bullying and revenge behaviours), but noted that there was a lack of clarity around what behaviours could be reported to the HE institution. In particular, interviewees indicated difficulty of finding someone within the institution who they could report to, or would act on their report. Some were too afraid to report and almost all of the interviewees talked about being blocked or dissuaded from reporting in some way. The report noted considerable variation in the amount of procedural information provided in university policies.

Advance HE (September 2018d) presented an operational update on the OfS's Catalyst projects on 'safeguarding students'. The funding was specifically focussed on tackling sexual misconduct, hate crime, and online harassment.

The OIA (October 2018) released the Good Practice Framework setting out how complaints and academic appeals should be set out. This encompasses good practice guidance in designing non-academic disciplinary procedures, "for dealing with misconduct such as antisocial, abusive or threatening behaviour, sexual misconduct, violence, harassment, hate crimes, behaviour likely to bring the provider into disrepute, damage to property or abuse of facilities, causing a health or safety concern, and other behaviour that might also be a criminal offence."

Technology-enhanced learning

UCISA (October 2018) revealed key trends in technology-enhanced learning (TEL), from their survey to HE institutions in the UK. Despite the investment in TEL services, there were no major changes in the way that technology was used to support learning, teaching and assessment activities. Delivery focusing on the provision of lecture notes and supplementary resources to students still represented the most commonly supported activity. Active learning, open learning and fully online course delivery modes showed little change from the previous survey (which was conducted in 2016).

Whilst there was limited tangible progress in distance education, institutions were exploring ways of expanding their fully online provision through the creation of dedicated distance learning units and collaboration arrangements with external/commercial partners. Developing new modes of course delivery was identified as one of the top three challenges for the future, with electronic management of assignments and learning analytics as the other priority areas.

Evaluation of the virtual learning environment (VLE) and lecture capture systems represented the most common systems under review. In contrast, there seemed to be very limited evidence of evaluation on the impact of TEL on the student learning experience. Where evaluation had taken place, this tended to focus on student satisfaction as part of a general review of TEL services. UCISA determined that the evaluation of staff pedagogic practices was at its lowest level since 2012. The lack of academic staff knowledge re-emerged as one of the top three barriers to TEL development, in combination with 'lack of time' and 'a supportive departmental/school culture'.

There was a perceived lack of staff digital capability and awareness of TEL affordances largely owing to the proliferation of systems that staff were expected to engage with.

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TEL accessibility

McLaren (September 2018) set out guidance related to law introduced in September 2018 (The Public Sector Web Accessibility Regulations) on accessible VLEs. Among the recommendations, drawn from findings of the All-Party Parliamentary Group for Assistive Technology (APPGAT), for individual HE and FE institutions, the report advised:

- Establishing multi-departmental working groups, with student representation, to develop or review strategy for improving digital accessibility;
- Recognising that a digital accessibility strategy's objective be focused on improving teaching and learning;
- Auditing the accessibility of the VLE and making a public timeframe and plan for addressing different types of pre-existing inaccessible content;
- Setting targets for training and raising awareness among academic staff;
- Publishing accessibility statements that provide guidance on how to use the VLE's accessibility features; and
- Designing effective procedures for responding to students' requests and notifications relating to inaccessible content.

In noting the OfS's 2019 review of support for disabled students, the APPGAT recommended assessment of the sector's progress toward digital accessibility and adding that, "the 2020-2021 guidance on Access and Participation Plans should then direct universities to consider the

recommendations of the 2019 review” (p. 6).

The intelligent campus

Jisc (October 2018) published guidance on the intelligent campus, and how it could aid learning and the student experience. Jisc also highlighted a number of ethical concerns (personal data and privacy; transparency, consent and sharing; and interpretation and validity) that merited discussion in the institution.

Managing change

Taylor (October 2018), in a project funded by Advance HE, presented an evaluation on the effectiveness of distributed arrangements for academic development at Wrexham Glyndŵr University, following the closure of its central educational development centre. The new arrangements, comprising a core academic development team supported by a network of academic development associates was considered to be significantly “more agile” in the achievement of effective change in the institution.

The graduate labour market

In High Fliers’ (January 2019) analysis of the graduate market in 2019:

- The number of graduates hired by organisations featured in *The Times* ‘Top 100 Graduate Employers’ increased by 4.3 per cent in 2018, following a drop in graduate recruitment in 2017. Graduate recruitment at the UK’s leading employers was “expected to rise substantially in 2019”: the UK’s top employers were increasing their graduate vacancies by 9.1 per cent in 2019, the highest annual rise in graduate recruitment since 2010.

- The biggest increases in vacancies were expected in the public sector, accounting and professional services firms, and engineering and industrial companies.
- Graduate starting salaries in the UK’s leading graduate employers was expected to remain unchanged for the fifth consecutive year in 2019, with a median starting salary of £30,000.
- The number of paid work experience places available at the UK’s leading graduate employers was projected to increase by 1.8 per cent in 2019. Over a third of recruiters repeated their warnings from previous years – that graduates with no previous work experience at all were unlikely to be successful during the selection process for their graduate programmes.

Employability

Drawing on HESA data. Prospects/HECSU and AGCAS (October 2018) provided further analysis of the 2017 Destinations of Leavers from Higher Education (DLHE) survey. This was the final year of the survey and elicited over 250,000 responses six months after graduation (77.3 per cent of the total cohort): the Graduate Outcomes survey, which collects data 15 months after graduation, replaced DLHE. Below are some of the insights gleaned from the subject expert summaries.

- *Business and administrative studies* – the percentage of graduates in full-time employment six months after their degree ranged from 58 per cent for economics graduates to 70.7 per cent for marketing graduates. The figures were higher than the average of 55.2 per cent for graduates from all subjects in full-time employment (i.e. excluding those in further study). The percentage for graduates who were unemployed were: 5.2 per cent for marketing graduates, 5.4

- per cent for hospitality, leisure and transport graduates, 6.1 for finance and accountancy graduates, and 6.3 per cent for economics graduates. These figures were slightly higher than the average for all graduates who were unemployed (5.1 per cent).
- *Creative arts* – Owing to the nature of the sector, self-employment, enterprise and freelance activities are common outcomes for creative arts graduates. The number of graduates working freelance was high across all of the subjects, with performing arts being the highest at 25.4 per cent and the lowest being design at 13.8 per cent. These figures are high when compared with the general graduate population of which 4.9 per cent were working freelance. The number on a permanent contract were lower than average (61 per cent), with performing arts being at the lowest at 38.6 per cent. Media studies graduates had, at 7.5 per cent, the highest unemployed percentage: the lowest was performing arts at 4.7 per cent.
 - *Humanities* – In general, humanities graduates were less likely to be working in either full or part-time than graduates as a whole. The proportion of those in work, including those in further study, ranged from 60.6 per cent of history graduates to 67.4 per cent of languages graduates, compared to 74.3 per cent of all graduates. For English and history graduates, the largest proportion of graduates were working as retail, catering, waiting and bar staff, indicating that many were in non-graduate roles. In general, humanities graduates were slightly more likely to be unemployed when compared to the rate for graduates as a whole: at 8.1 per cent, philosophy had the largest proportion of unemployed graduates in humanities subjects.
 - *Science* – A relatively small percentage of science graduates became science professionals six months after graduation. The largest proportion of graduates in science professional roles were chemistry graduates (17 per cent), and almost 18 per cent of sports science graduates became sports coaches, fitness instructors, or officials. More than 21 per cent of physics graduates became IT professionals. Unemployment remained higher than the overall graduate population in biology, chemistry and physics, though science graduates were more likely to pursue further study than the overall graduate population.
 - *Social sciences* – Many graduates from the social sciences chose alternatives to full-time work (i.e. further study) six months after graduation, thus continuing a trend since 2012. Social science graduates were more likely than average to go into graduate positions that did not require a specific subject, including commercial roles. This was particularly true for geography and politics students were almost twice more likely to go into business, HR and finance roles or marketing, PR and sales. Probably owing to the international perspectives of their subjects, geography and politics graduates were most likely out of the social sciences to be working overseas (3.1 per cent compared to an average of 1.8 per cent). Sociology, politics and geography graduates were all slightly more likely than average to be unemployed.
 - *Technology, engineering and mathematics* – Working full-time was the most likely outcome for technology, engineering and mathematics graduates. When compared with the total graduate cohort, architecture and building studies (70.3 per cent), civil engineering (66.6 per cent), IT (64 per cent), and mechanical

engineering (63.9 per cent) were all above the average of 55.2 per cent. Whilst mathematics, at 47.6 per cent, was the only subject to have lower than average full-time employment outcomes, mathematics graduates were more likely to go on to further study. Only civil engineering (4.8 per cent), and architecture and building studies (4.9 per cent) were below the average for unemployment for the whole graduate cohort (5.1 per cent). Whilst unemployment was down in most subjects compared to the previous year's levels, they were still relatively high in IT (9.4 per cent) and mathematics (7.5 per cent).

First destinations of disabled graduates

The AGCAS Disability Task Group (August 2018) reported on the employment outcomes of disabled and non-disabled graduates of 2016. In the 2015/16 DLHE survey, 12.9 per cent (n=41,490) identified themselves as having either a disability or learning difficulty during their period of study. Compared to non-disabled graduates, at all qualification levels, graduates disclosing a disability were less likely to be in full-time employment, more likely to be in part-time employment, and more likely to pursue further study. Further, graduates disclosing a disability were more likely to be self-employed or in the process of starting their own business than non-disabled graduates. Graduates with a social communication condition/Autism Spectrum Disorder (ASD), were the least likely of all disability groups to be in full-time employment and most likely to be unemployed. The Task Group noted, that in the three years of study, there had been a year-on-year increase in the proportion of graduates disclosing a disability.

Enterprise education

The APPG for Entrepreneurship (November 2018) stressed the need for government to improve the pipeline of enterprise education thought all levels of education. The report advocated introducing the right incentives to ensure that enterprise education evolved beyond silos, and recommended flexibility in the language used so as not to deter university students.

Graduate earnings

The IFS, in a report for the DfE, analysed the impact of UG degrees on early-career earnings (Belfield et al., November 2018). Using the new Longitudinal Educational Outcomes (LEO) administrative dataset, the IFS estimated the effect of attending HE at age 18 on annual gross earnings at age 29. Further, the study compared HE students with those who did not go to HE but had achieved at least A*-C GCSEs, whilst controlling for differences in prior attainment, Key Stage 5 subject choices, and family background. Amongst the findings, the IFS revealed:

- At age 29 the average male who had attended HE earned around 25 per cent more than the average male (with five A*-C GCSEs) who did not, and for females the gap was found to be higher than 50 per cent;
- When compared with men with similar background characteristics who did not go to HE, those males who studied creative arts, English or philosophy had lower earnings on average at age 29;
- Earnings increased by more than 20 per cent with those males who studied medicine or economics;
- For females, no subjects were found to have negative returns, and those that studied medicine or economics increased

- their age 29 earnings by around 60 per cent;
- Significantly negative returns for males at age 29 were prominent in 12 institutions, while 18 institutions recorded average returns in excess of 20 per cent; and
- For females, despite high returns on average, statistically negative returns at age 29 were evident in two institutions, while 66 institutions recorded returns of more than 20 per cent.

Internships

The Sutton Trust examined the role and nature of internships (Cullinane and Montacute, November 2018). A large number of internships were offered through informal networks, rather than in open advertisements. Amongst the findings, the report revealed that 70 per cent of internships were unpaid, with over a quarter (27 per cent) of graduates having completed at least one paid internship. 89 per cent of internships in retail, 86 per cent of internships in the arts (TV, theatre, film, fashion), and 83 per cent in media were unpaid. By contrast, 26 per cent of IT and 32 per cent of manufacturing internships were unpaid. 39 per cent of graduates in their twenties had done an internship and were more likely to be middle-class and likely to live in London and other urban areas.

Practice-informed learning

Drawing on the experiences of 17 GuildHE member institutions the positive impacts of practice-informed learning on student learning were highlighted by the mission group (GuildHE, November 2018). The study was sparked by a sense of a risk that the TEF (Teaching Excellence and Student Outcomes Framework) ignores students' positive views on staff with relevant industry experience (p. 9). Featuring 19 case studies,

the report outlines questions to consider in relation to: the benefits for students; enhancing professional practice; the benefits for employers; wider social and economic impacts; and the wider challenges of practice-informed learning.

Social work higher education

In analysis of HESA data, and in response to the reform of social work and social work education initiated by the DfE and the Department of Health and Social Care, Skills for Care (November 2018) reported:

- 4,400 students enrolled onto social work courses in 2016/17 and, thus, similar levels since 2012/13. Prior to this, enrolments decreased by around 1,000 (20 per cent) between 2010/11 and 2012/13.
- PG enrolments increased by 13 per cent in 2016/17 (the number had previously decreased each year between 2010/11 and 2014/15).
- In 2016/17 UG enrolments decreased by 12 per cent on the previous year.
- The ethnic distribution of students enrolled on social work courses in 2016/17 was 66 per cent white and 34 per cent BAME (Black Asian and Minority Ethnic): the proportion of BAME students increased from 25 per cent in 2011/12. (Social worker enrolments had a greater proportion of people from BAME backgrounds than the average across all HE – 27 per cent).
- The number of qualifiers in 2016/17 was five per cent higher compared to the previous year (there had been two consecutive periods of decreasing qualifiers).
- 91 per cent of social work graduates found employment six months after graduating with a qualification (i.e. higher than the 77 per cent of graduates across all HE).

- Around 74 per cent of qualifiers in 2016/17 were employed as social workers within six months of graduation (in 2011/12 the conversion rate was just 55 per cent).
- Students from regions with fewer graduates were more likely to find employment as social workers.

Nursing higher education

In preparation for a House of Commons debate on nursing higher education in England, that took place on 21 November, 2018, Hubble et al. (November 2018) produced a 'debate pack' on trends in nursing education. In particular, the pack focused on the impact of the change in funding (from NHS bursaries to standard loans for tuition fees and maintenance) on applications to nursing courses.

Graduate wellbeing

A guide produced by the OfS (October 2018) examined the differences in wellbeing scores between different groups of graduates 40 months after graduation.

- Graduates aged 21 and over at the start of their course were more likely to give very high rating to the statement 'what you do is worthwhile' than those who were under 21;
- Graduates who reported having a disability were less likely to report very high levels of happiness and life satisfaction than those who did not;
- For graduates who were in employment 40 months after graduation, those who remained in their home region for study and employment were the most likely to report very high levels of happiness;
- Graduates whose course included a sandwich year reported higher levels of life satisfaction than those who did not take a sandwich year;

- Graduates from courses in education and subjects allied to medicine were most likely to report very high levels of life satisfaction and happiness, whilst those from courses in computer sciences had the highest proportion with low happiness scores;
- A higher proportion of female graduates reported a very high rating for the sense that the things that they were doing were worthwhile.
- Graduates from POLAR3 quintile 1 reported very low levels of anxiety more commonly than those from quintile 5 areas; and
- Graduates who achieved a first class degree more commonly reported high levels of anxiety than those with any other degree classification.

Institutional collaboration

UUK (October 2018c) presented eight case studies from across the UK, that demonstrated how various types of collaboration involving universities, FE colleges, and employers operate. The report examined the drivers and benefits of collaboration and ideas on how universities, the FE sector and employers might collaborate more closely, with a particular emphasis on overcoming potential barriers.

Accountability and transparency

As noted in the Advance HE/HEPI student experience studies, since the introduction of the £9,000 student fee, students have expressed preferences about how their fees should be spent: there has been a strong preference for teaching-related spending. In Hillman et al.'s (November 2018) HEPI report, the authors argue for greater transparency on the uses of student fees: the report includes six (English HE institutional) case studies.

Internationalisation

UKCISA (December 2018) reported on the results of a benchmarking survey distributed to its members (all HE institutions, internationally active FE colleges, and “a number of” private colleges) between February and April 2018: the previous survey had been administered in 2010/11. UKCISA concluded that support for international students in the UK was extensive and well-developed (pre-departure information, induction and orientation, accommodation, international student support, social activities). The two trends noted since the previous study related to the embedding of digital communication, and a refinement of activities (welcome and social activities) that was open to all students, thus “making student communities feel more inclusive” (p. 30). The report advised that there needed to be greater provision of advice and support for students on working during and after studies.

The MAC’s report (September 2018) on the impact of international students in the UK considered policy, trends in numbers coming to the UK, and where and what they studied. The report highlighted the impacts of international students while they studied, on the economy, educational institutions, domestic students, and wider communities. The report noted that, as an important export market, international students generated in the region of £17.6 billion in 2015. International students supported local economies (directly, and by friends and families visiting them), and were a vital source of income for the institutions where they studied. Domestic students were generally positive of studying alongside international students.

Recent cohorts of international students on a Tier 4 visa recorded high compliance with their visa expiration conditions, with around

a quarter extending their visa, usually for further study. However, the report noted that, following changes to the post-study visa rules in 2012, the number applying for a visa extension for work dropped sharply (from over 45,000 to around 6,000). Most international students moving from a Tier 4 student visa to a Tier 2 work visa tended to move into STEM or business-related jobs and were more likely to come from research-intensive institutions. Amongst the recommendations, the report called for a removal of international students from the net migration statistics, and a widening of the window in which applications for switching from Tier 4 to Tier 2 could be made.

UUK (September 2018b) outlined proposals for a temporary Global Graduate Talent Visa. Under the visa, all HE institutions registered as Tier 4 sponsors would be able to sponsor their graduates to search for and gain work experience in the UK for up to two years on a more flexible basis, without restrictions on job level or salary, and without an employer sponsorship requirement. It was posited that the visa would enable international graduates a longer period to search for a Tier 2 eligible role, allowing a wider range of employers (including small and medium sized enterprises) to benefit from access to talented graduates, as evidenced in competitor economies (USA, Canada, and Australia).

The Home Office set out plans for a single skills-based immigration system in a white paper presented to Parliament (HM Government, December 2018). Following the release of the MAC report, the Government indicated that it intended to offer six months’ post-study leave to all masters students, and bachelors students studying at an institution with degree awarding powers, thus giving more time to

secure permanent skilled work and to work temporarily during that period.

Kumari (September 2018), in a report for the HEC, posited that the UK risked losing its position in global enrolments to Australia (for a while the UK has been in clear second place next to the USA). The report noted that other countries were putting policies into practice that were attracting a much larger share of mobile students. Inertia around the implications of Brexit, funding policy on EU students, and visa and regulatory policy had the effect of putting UK universities at a disadvantage. The report called for clear targets for student numbers, as evidenced in other competitor countries together with a cross-departmental strategy on international HE in the UK and abroad.

Using data from sources including Hotcourses Group, HESA, UCAS and the Home Office, UUKi (November 2018) presented a picture of international demand for UK higher education, together with a comparison with the UK's international competitors.

- Non-European nations witnessed stronger growth in international student numbers than the UK, France and Germany since 2011. China had now overtaken the UK as the second largest recipient of enrolled international students. Whilst the USA witnessed strong growth over the decade, this was beginning to plateau. Australia witnessed strong growth from 2015.
- In terms of Tier 4 visa applications, there were more than double as many applicants from China in 2018 as there were in 2011. Applicants from India were in steady decline, despite some growth since September 2017, whilst a steep downward trend from Nigeria, “faltering momentum” from Malaysia,

and decreases from Saudi Arabia, were also noted.

- As far as applicants from the EU were concerned, applicants from Ireland slipped to third behind France and Italy: positive trends were recorded in applicants from Poland and Spain.

Student outward mobility

There were 89 institutional responses to UUKi's (January 2019) Mobility Management Survey 2018, which was aimed at providing a fuller picture of the breadth and scale of mobility operations across the UK. The results indicated that outward mobility was included in most of the universities' strategic plans (83 per cent of respondents). Nearly half of the universities had a dedicated outward student mobility strategy and two-thirds of respondents had an outward mobility target. The report noted that, “Mobility [was] beginning to be embedded in the access agenda..., with 14 per cent of universities including mobility in their widening participation strategy” (p. 3). Much of the growth in activity was evident in short-term programmes (i.e. one to four-week programmes).

90 per cent of universities reported that their budget for outward mobility had either increased or stayed the same, though 46 per cent reported being under-resourced. Over half of the universities had increased funding allocated to outward mobility scholarships. UUKi indicated that the next Mobility Management Survey would be circulated in 2020.

Transnational education

In trend analysis of UK transnational education (TNE), based on HESA data, UUKi (October 2018) reported that Asia hosted 48.7 per cent of students. This was followed by: Africa (22.5 per cent); the EU

(10.9 per cent); the Middle East (9.6 per cent); North America (4.6 per cent); Non-EU Europe (2.8 per cent); Australasia (0.6 per cent); and South America (0.4 per cent). In 2016/17, the five countries hosting the highest number of students were: Malaysia (10.5 per cent); China (9.9 per cent); Singapore (6.8 per cent); Pakistan (6.2 per cent); and Nigeria (4.7 per cent).

WECD (September 2018) presented 17 UK TNE case studies, reflecting several models (e.g. branch campus, dual degree, joint degree, franchise agreement and validation, and blended learning). UUKi (September 2018) issued a discussion paper highlighting some of the factors that universities should consider when deploying staff overseas to support TNE programmes. The paper focused on: supporting diversity and opportunity; legal considerations; expectations of and about staff based overseas; and the incorporation of these themes in TNE strategy and leadership.

HE workforce (academic staff)

According to HESA (January 2019) data, the number of staff on teaching only contracts in 2017/18 stood at 61,050, compared with 51,970 in 2014/15. 41 per cent of full-time academic staff were female and, of academic staff with known ethnicity, 16 per cent were BME in 2017/18.

Advance HE (September 2018b) presented a snapshot of the age, disability, ethnicity and gender of the HE workforce in 2016/17, as well as on the interplay of these identities.

- *Age* – staff in the youngest and oldest age groups tended to be on teaching only contracts, and their leaving rates were markedly higher compared with those in the middle age groups.
- *Disability* – disclosure rates remained persistently lower among academic staff

than professional and support staff and among professors compared with other academics. Larger proportions of staff disclosed as disabled were on fixed-term contracts and the proportion of academic leavers no longer in employment was considerably higher among disabled staff than non-disabled staff.

- *Ethnicity* – there were lower proportions of both UK and non-UK BME staff than white staff on open-ended/permanent contracts, in senior management positions, and on higher salary bands. Proportions of BME staff varied greatly between subject areas, with BME staff comprising relatively high proportions of academics working in SET compared with non-SET subjects. Leaving rates among BME academics were also higher than for white academics.
- *Gender* – despite comprising the majority of staff working in UK HE, women remained underrepresented among academic staff, staff in SET subject areas, and in senior management roles. The proportion of female academic leavers was higher than the proportion of male academic leavers.

In analysis for the UCEA, Hopkins and Salvestrini (November 2018) examined the differences in the basic pay of female and male staff in two broad ‘Asian’ and ‘black’ ethnicity groups and that of white men and white women. (The term ‘pay penalty’ describes the pay gaps that remain after taking into account observable characteristics that influence earnings.)

Amongst the findings, the authors reported:

- Pay penalties for ethnic minorities were significant in the sector with black men and black women earning the least on average;
- There was no significant gender pay gap between black men and black women;

- Asian men earned significantly less on average than white men but marginally more than white females;
- The gender pay gap between Asian men and Asian women was significant;
- Black men and black women were much more likely to work in lower level grades and much less likely to work in senior

and management positions than their white and Asian counterparts; and

The pay penalty experienced by ethnic minority women in the sector is much more likely to be owing to factors associated with their ethnicity than their gender.

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